

LICKING COUNTY FOUNDATION

Donor Advised & Community Charitable Fund Grant Recommendation Form

1. FUND INFORMATION

Fund Name: _____

2. GRANT RECIPIENT

Organization Name: _____

Mailing Address: _____

Contact Name: _____ Title: _____

Phone: _____ E-Mail: _____

3. GRANT AMOUNT & PURPOSE

Grant Amount (*Please consider making grants of no less than \$250*): \$ _____

Purpose (*If other than general support*): _____

4. ACKNOWLEDGEMENT INFORMATION

List Donor Name(s) As (*If different from standard listing; e.g., in memory or honor of someone or to celebrate a special occasion*): _____

Please make fund name anonymous Please make donor name(s) anonymous

5. CERTIFICATION

I understand that this grant recommendation must be approved by the Governing Committee of the Licking County Foundation, which is guided by the governing documents and grantmaking policies of the Foundation; and that the entire process may take up to two weeks. I certify that I will not receive any tangible personal or professional benefit from this grant (*e.g., tickets, memberships, meals, preferred parking or seating, discounted merchandise or other preferential treatment*), and this grant adheres to the *Grant Restrictions* on the reverse of this page. *Please note that the Pension Protection Act of 2006 imposes penalties on donor advisors and foundation staff who do not follow these rules.*

Advisor Name (please print): _____ Date: _____

Advisor Signature: _____

6. SUBMISSION & PROCESSING

Mail: Licking County Foundation, PO Box 4212, Newark, OH 43058-4212

Fax: 740-322-6260 **Email:** grants@thelcfoundation.org

Additional copies of this form can be downloaded at <http://www.thelcfoundation.org/grants/dafunds/>

7. QUESTIONS

Please contact 740-349-3863 or grants@thelcfoundation.org

PLEASE SEE THE REVERSE SIDE FOR GRANT RESTRICTIONS AND PROCESSES



Donor Advised & Community Charitable Fund Grant Disbursement Process

1. GRANT REQUEST OR RECOMMENDATION FORM IS RECEIVED

The appropriate form must be submitted by the fund advisor to begin the process. Forms can be found online at: <http://www.thelcfoundation.org/grants/dafunds/>. We encourage grant recommendations of no less than \$250.

2. CONFIRMATION OF GRANT AMOUNT AVAILABILITY & PURPOSE

The Licking County Foundation reviews the Grant Recommendation Form to ensure the requested amount is available for disbursement and that the purpose of the grant is charitable, meets the purpose of the Fund, and that no *quid pro quo* benefit is associated with the grant.

3. GRANT RESTRICTIONS

Grants cannot be made from donor advised funds to private non-operating foundations, international organizations or to individuals. Grants cannot be made from donor advised funds for memberships, tickets to events, goods purchased at a charitable auction or other fundraising event, or anything else that benefits the donor. Grants cannot be made or to support political campaigns or for lobbying purposes. Grants cannot be made for event sponsorship that includes tickets, advertising space, or other benefits to the sponsor; and for direct advertising for corporate donors or public officials. Donors, their advisors, and related parties may not receive grants, loans, compensation or similar payments (including expense reimbursements) from the donor advised funds. *Please note that the Pension Protection Act of 2006 imposes penalties on donor advisors and foundation staff who do not follow these rules.*

4. GRANTEE'S ELIGIBILITY IS CONFIRMED

The Licking County Foundation can, by law, only grant to qualified 501(c)3 charitable organizations and religious or governmental institutions and must confirm a recommended grant recipient's IRS status ruling prior to disbursing a grant. You will be notified if an eligibility issue arises. There also may be a delay if the organization does not respond in a timely manner to information requests.

5. COMMUNITY FOUNDATION BOARD APPROVAL

It is the Foundation's practice to generally follow the fund advisor's recommendation. However, the final decision about all recommended grants rests with Foundation's Governing Committee. Our board has fiduciary responsibility for, and final authority over, all grants made from every fund at the Foundation. All grant disbursements are reviewed and approved by the Governing Committee of the Licking County Foundation.

6. GRANT DISBURSEMENT PROCESS

The entire process, from receipt of your suggestion to mailing the approved grant will typically take about two weeks (longer if securities need to be sold).

7. COMMUNICATION WITH GRANTEE

Grant disbursements are sent directly to the organization with the source of the grant and any special designation indicated on the check. They also receive a letter with details on how the funds are allowed to be used and proper forms of recognition. Unless you request anonymity, the recipient charity will be informed of the name of the fund and the advisor. The fund advisor will receive confirmation from the Foundation of the grant disbursement.